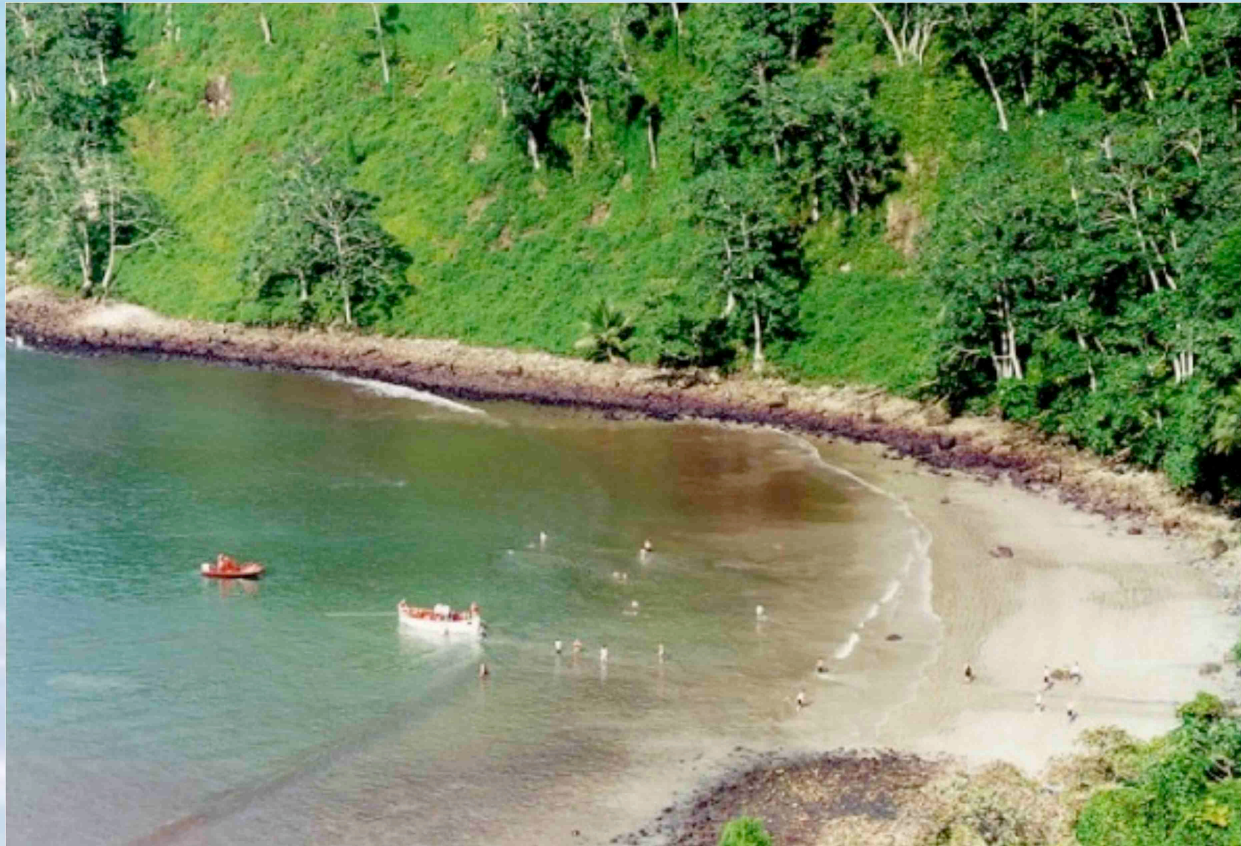


ETPS

TRAINING

Eastern Tropical Pacific Seascape Training

Module 4: ASSESSMENT



The need for assessment

Is sustainable tourism a good idea for this community & MPA?

Can the MPA/area attract tourists?

Can the MPA/area support tourism infrastructure?

Will the benefits outweigh the costs?

Will it be financially sound and self-sustaining?

ASSESSMENT: Studying the attractions, infrastructure, location, and other features of the MPA/local area to assess whether it would be useful to the MPA & community to pursue a sustainable tourism plan.

What is the first step?

4.1 SWOT ANALYSIS

Strengths (internal)

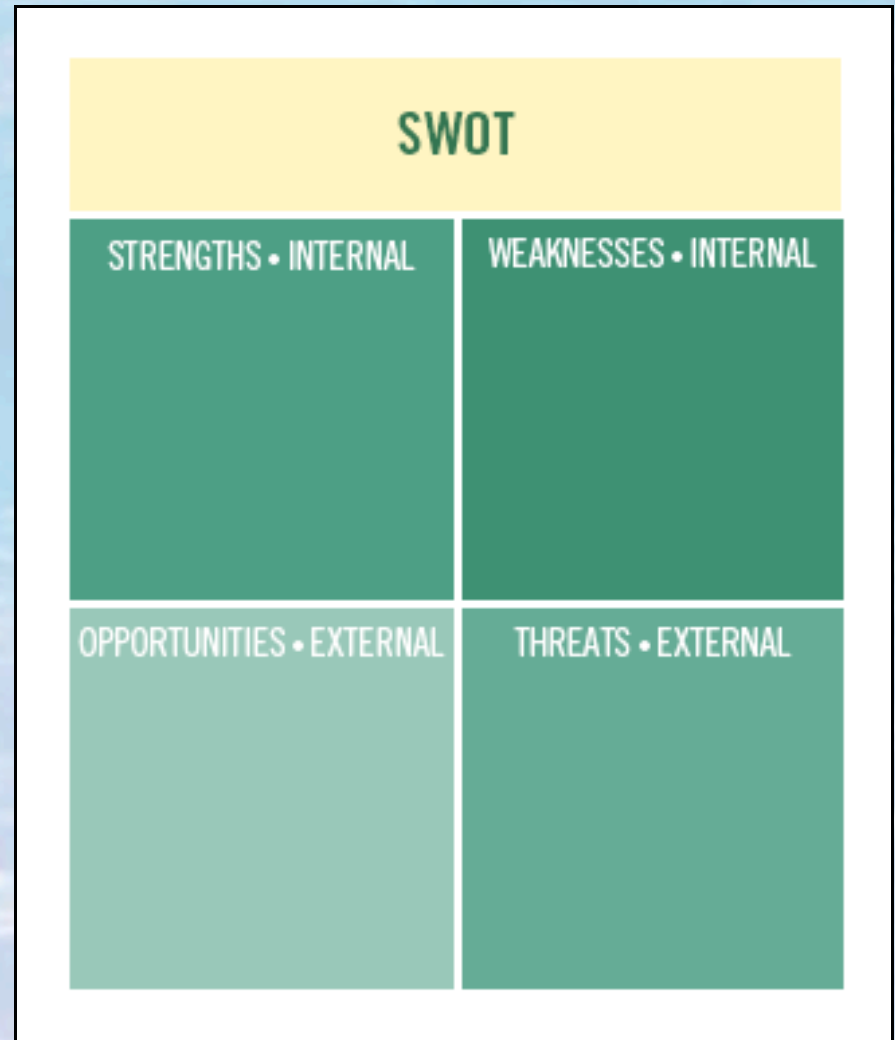
Weaknesses (internal)

Opportunities (external)

Threats (external)

"internal" - under local control

"external" - not under local control



Possible SWOT analysis questions

Strengths

Do you have a popular tourism destination?

What aspects of the environment or heritage is being well managed?

Do you have knowledgeable people working in tourism and heritage management?

What are the strengths of your staff or the people involved?

Opportunities

Is there an opportunity to promote your natural and cultural assets to tourists?

Are there people in the community interested in working in tourism and heritage management?

Could tourism utilise underused infrastructure (eg historic buildings)?

What opportunities are there for partnership and collaboration?

Weaknesses

Are current approaches to interpretation looking a little old, or in need of revision?

Are there physical factors of the place or region which make visitor management difficult?

Are there particular factors which present problems for marketing?

What does evaluation and feedback indicate could be done better?

Is there a lack of training or capacity?

Threats

What threats are there to the heritage values of the place or region?

What threats are there to the physical condition of heritage places?

What threats are there to the livelihood or ongoing economic or social viability of the local community?

What threats are there to the viability of the business?

What threats are apparent from an analysis of potential risks?

Exercise: Do a SWOT Analysis

Using the SWOT chart, perform a SWOT analysis for your own MPA or local area.

What is your recommendation?

1. Do not proceed with sustainable tourism plan
2. Proceed in part
3. Proceed with a full plan

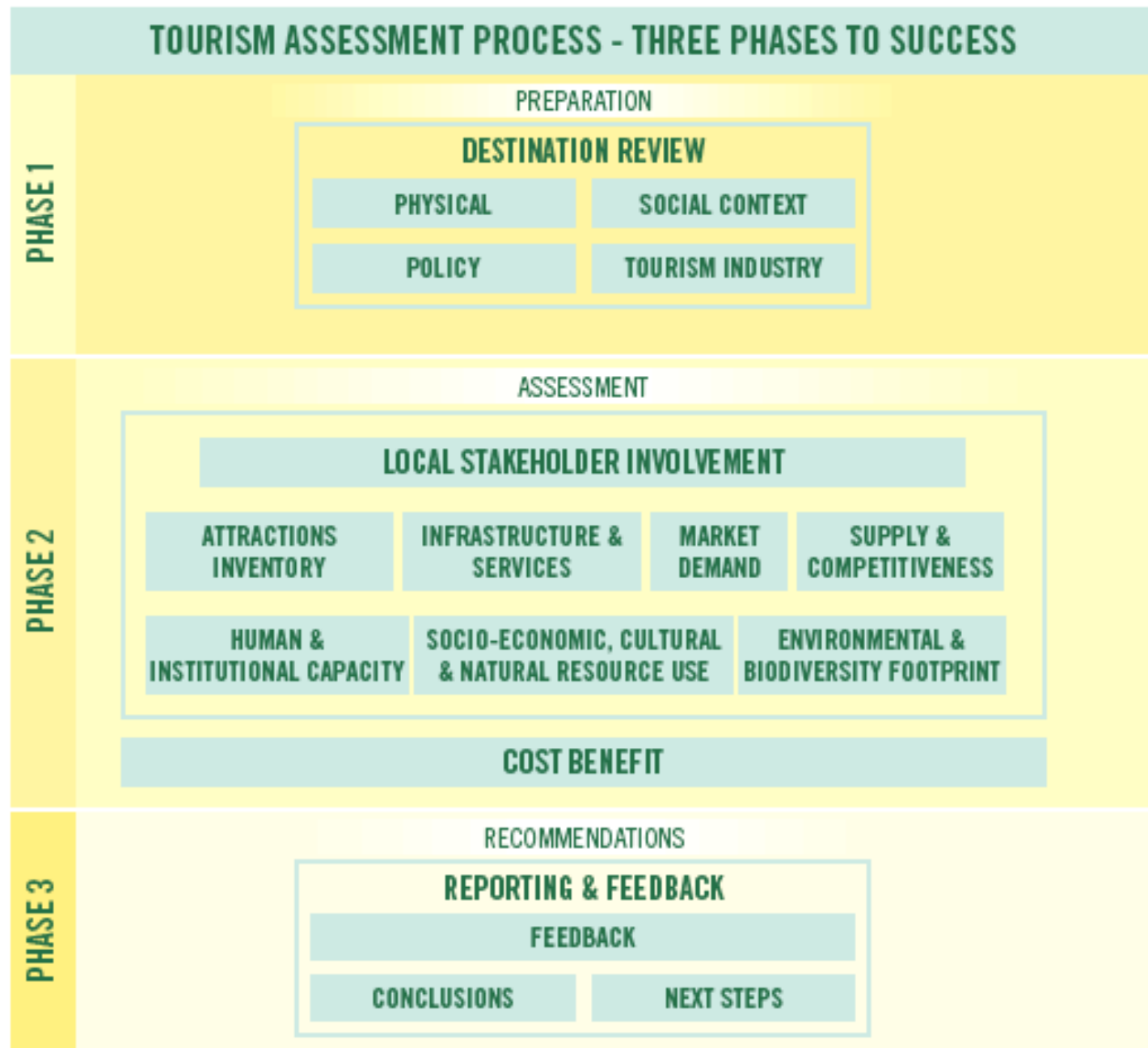
4.2 ASSESSMENT & DIAGNOSTIC PROCEDURES

General outline of the process:

First, build an assessment team.

Then:

- 1. Initial review of the MPA & community**
- 2. Detailed assessments**
 - Attractions, market demand, etc.**
 - Involve community at this stage**
- 3. Analysis, feedback to community, & decisions**



Building an Assessment Team

Keep it small (3-5 is good)

Keep in mind the required time commitment

- may be working together several months

Will do field trips, plan meetings, etc.

Responsible for:

- Attractions inventory
- Infrastructure & capacity inventory
- Survey/identify other stakeholders
- Arranging meetings, focus groups, etc.

Will eventually coordinate with other stakeholders to form a larger "working group"

Designate a team leader, & be sure decision-makers & key MPA staff are included

Who do you want on your assessment team?

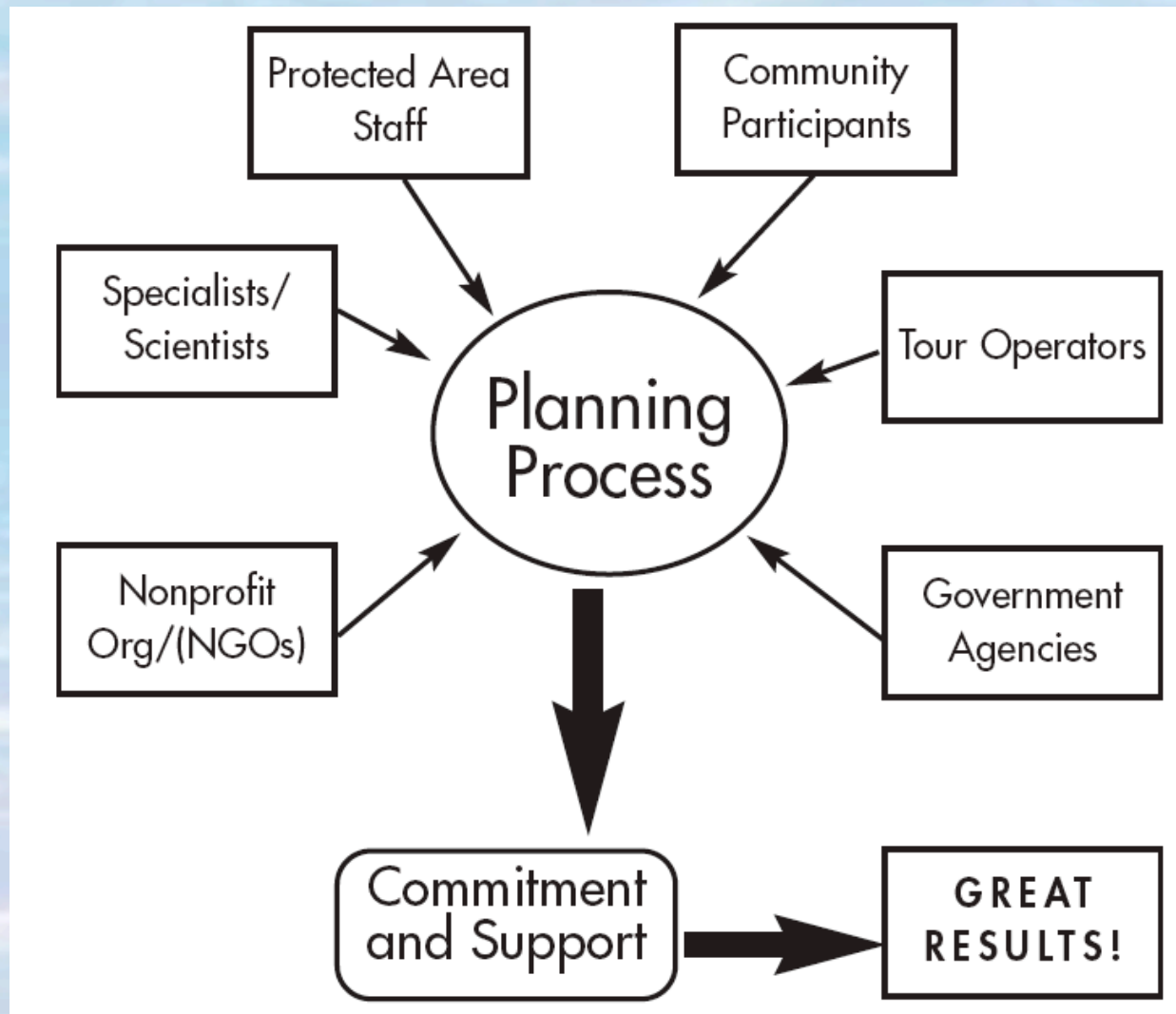
Knowledge needed:

Tourism development
Business & marketing
Local cultural heritage & history
Local wildlife, plants, other natural resources
Environmental/biodiversity conservation
Socio-economic development
Local, regional, international tourism
...others?...

Interpersonal skills needed:

Ability to interact easily with residents & visitors
Listen to & understand other people
Build rapport & trust easily
Respected by the community
...others?...

The need to involve stakeholders



Exercise: Building your planning team

- 1. Working in small groups, take 15 minutes to develop a “dream team” for assessing & planning for sustainable tourism in your MPA.**
- 2. Describe the “dream team” to the large group (5 minutes each). Explain why you want those particular people.**

What information is needed?

Attractions inventory
Infrastructure & services inventory
Market demand
Competition
Human & institutional capacity
Socio-economic & cultural factors
Conservation impacts

Two basic questions:

- 1. Can the area attract & serve tourists?**
- 2. Can it withstand the impacts of tourism?**

How can we get the information?

- 1. Review of existing materials**
- 2. Fieldwork**
- 3. Gathering information from other people**

Let's go through each of these one at a time....

Reviewing existing materials

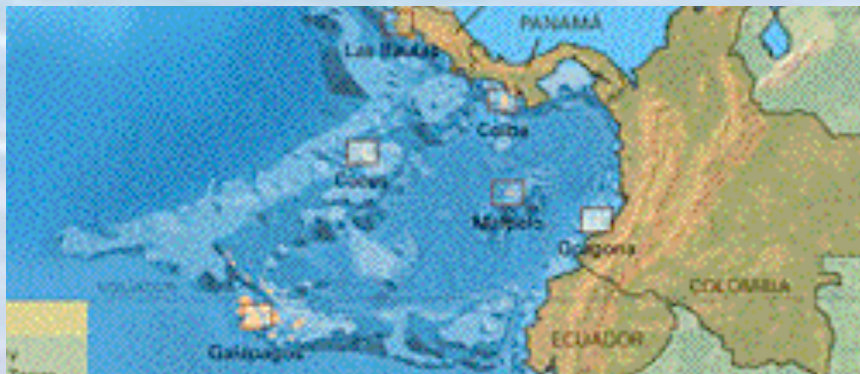
- The general management plan
- Relevant legislation and policy documents
- Scientific studies
- Wildlife inventories
- Visitor surveys & profiles
- Tourism statistics (for MPA & nearby sites)
- Analysis of national tourism trends)

How many of these do you have?

Are there are other materials you could make use of?

Fieldwork: Touring your own MPA

- How long does it take to get from one place to another?
- Is the MPA accessible? Are sites within the MPA accessible?
- Where are the potential lodging sites?
- What are the major attractions?
- What are the activities that visitors might engage in?
- What are the obstacles?
- Is it safe?
- Is it comfortable?



Discussion: Your own tourist experiences

What have been your own tourist experiences in the ETPS?

What your favorite tourist experiences? Why?

What were your least favorite tourist experiences? Why?



ETPS

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Gathering information from other people

WHO: Local residents, tour operators, hotel owners...

HOW:

Interviews & focus groups
Questionnaires & surveys
Workshops & meetings



Thank you for participating in our study today. The list of questions and that participants will consider are intended to be used as a guide for information development in this area. Please be assured that your responses will be held in confidence. Note that any action to be taken should be based on the findings of the study.

1. In this year did you visit? ☐ yes ☐ no

2. If you answered no to question #1, how many times, in total, have you visited this area? _____

3. Are you traveling? ☐ alone ☐ in a group ☐ with family ☐ with friends

4. How many people in your travel party? _____

5. In which country are you presently visiting? _____

6. What was your primary reason for visiting this area? (please choose one)
☐ leisure ☐ business ☐ visiting friends and relatives ☐ other _____
☐ education, short term (less than 1 year) ☐ education, short term (less than 1 year) ☐ other _____

7. How long did you stay in this area? (please choose one)
☐ for the night ☐ 2-4 days ☐ 5-10 days ☐ 11-20 days ☐ more than 21 days

8. How did you hear about this area? (please choose one)
☐ radio ☐ newspaper ☐ magazine ☐ Internet ☐ word of mouth

9. What was your mode of transportation to this area? (please choose one)
☐ commercial car ☐ private car ☐ bus ☐ train ☐ other, please specify _____

10. How important were the following factors in your decision to visit the area?
(Please circle the number of the column that represents your level of importance for each factor)

Factors	Not important at all	Not important	Important	Very important
Good weather conditions	4	3	2	1
Quality of cultural scenes & landscape/environment	4	3	2	1
Opportunity to see wildlife	4	3	2	1
Proximity to parks and other natural areas	4	3	2	1
Opportunity to learn about other cultures, their ways of life & beliefs	4	3	2	1
Participation in a new cultural or religious event	4	3	2	1
Opportunity to visit an indigenous or traditional community	4	3	2	1
Opportunity to experience traditional ways of life	4	3	2	1
Opportunity to learn about and experience local and cultural education	4	3	2	1
Opportunity to learn about local customs and traditions	4	3	2	1
Good prices for quality services	4	3	2	1
Good food/beverage service	4	3	2	1
Facilities for visitors	4	3	2	1
Accessibility	4	3	2	1
Safety	4	3	2	1

11. What activities have you been doing or will you be doing while in this area? (please check all that apply)

Activities	Yes	No
<input type="checkbox"/> shopping	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> sightseeing	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> relaxing	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> visiting friends and relatives	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> visiting museums	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> visiting art or music performances (e.g. dancing, singing, craft demonstrations)	<input type="checkbox"/>	<input type="checkbox"/>



4.3 GATHERING INFORMATION

Discussion: Which questions would you like to ask of local residents? of tour operators? of tourists?

Some topics for questions:

Natural resources

Cultural resources

Political & economic climate

Visitor profiles

Tourism industry

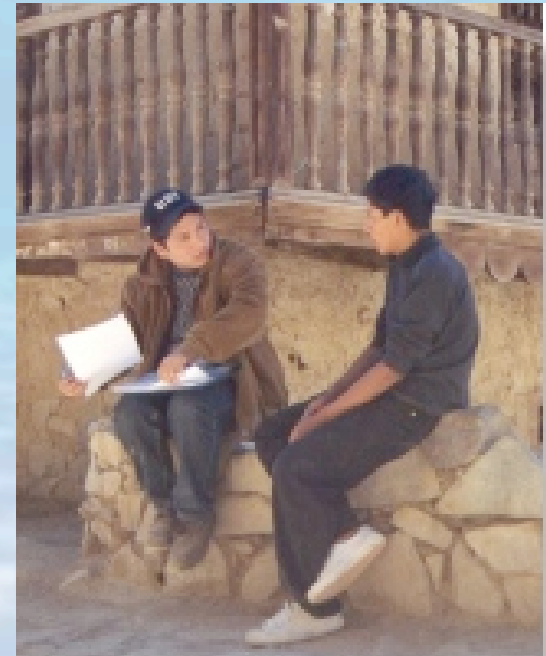
Communities

See the handout & manual for more ideas for questions.

Tools for gathering information

Interviews

- Best way to get detailed information
- Can use pre-planned list of questions; or can be an open-ended conversation (good if you are not sure yet what the major issues are)
- Can combine with field trip of MPA & area - may bring up more issues for discussion



Peru

Tools for gathering information

Questionnaires & surveys

Useful when sample sizes are too large for interviews

Need to be short & well-designed

Often useful to do 2 surveys: visitors & residents



South Caicos Island

Thank you for participating in our visitor survey. The team of consultants and local participants will consider your responses as we assess the potential for restoration development in this area. Please be assured that your responses will be held in confidence. Note that any visitors to this area should fill out this form, not residents.

1. Is this your first time visiting? ☐ yes ☐ no
2. If you answered no to question #1, how many times, in total, have you visited this area? _____
3. Are you traveling: ☐ alone ☐ as a couple ☐ with friends ☐ with family
4. How many people are in your travel party? _____
5. In which country do you permanently reside? _____
6. What was your primary reason for visiting this area? (please choose one) ☐ other
☐ leisure ☐ business ☐ visiting friends and relatives ☐ education, short-term (less than 1 year) ☐ volunteerism, short-term (less than 1 year)
7. How long will you be visiting this area? (please choose one)
☐ 1 to 3 days ☐ 3 to 10 days ☐ 11 to 20 days ☐ more than 21 days
8. How did you hear about this area? (please choose one)
☐ radio ☐ television ☐ newspaper ☐ magazine ☐ Internet
☐ travel brochure ☐ tour operator ☐ word of mouth
9. What was your main mode of transportation to this area? (please choose one)
☐ personal/rented car ☐ airplane ☐ tour bus/tour vehicle ☐ boat
☐ taxi ☐ other, please specify _____
10. How important were the following factors in your decision to visit the area?
 Please circle the number of the answer that represents your estimation of each factor.

Factors	Very important	Important	Not very important	Not important at all
Good weather conditions	4	3	2	1
Quality of natural scenery & landscape/environment	4	3	2	1
Opportunity to see wildlife	4	3	2	1
Wants to parks and other pristine natural areas	4	3	2	1
Opportunity to enjoy pristine natural environment	4	3	2	1
Desire to learn about other cultures, their ways of life & heritage	4	3	2	1
Participation in major cultural or religious events	4	3	2	1
Opportunity to visit an indigenous or traditional community	4	3	2	1
Opportunity to experience traditional ways of life	4	3	2	1
Opportunity for learning about and experiencing natural and cultural attractions	4	3	2	1
Opportunity for education/tour activities	4	3	2	1
Good prices for quality services	4	3	2	1
Good local transportation system	4	3	2	1
Recommendations from a friend/book	4	3	2	1
Facilities for visitors	4	3	2	1
Accessibility	4	3	2	1
Safety	4	3	2	1
Interest in business investment in visited area	4	3	2	1

11. What activities have you been doing or will you be doing while in this area? (please check all that apply)
☐ hiking/hunting ☐ wildlife viewing ☐ fishing ☐ visiting indigenous populations
☐ swimming ☐ visiting villages ☐ visiting small towns or villages
☐ visiting historical places ☐ cultural heritage sights ☐ visiting national parks
☐ climbing ☐ attending art or music performances (i.e. dancing, drumming, singing, craft demonstrations)

Tools for gathering information

Workshops & meetings

- Bring stakeholders together, lets them exchange ideas
- Make stakeholders feel involved
- Can be educational for the community
- Be sure there is *follow-up* afterwards



Public meeting in the U.S.

Case Study: Tanzania

Full assessment of Tanzanian coast for sustainable tourism (2001)

"Coastal Tourism Working Group":

studied tourism statistics & trends in Tanzania
traveled entire coastline to perform:

1. attractions inventory
2. accommodations inventory
3. accessibility inventory

Sought to identify areas with unique attractions clustered together.

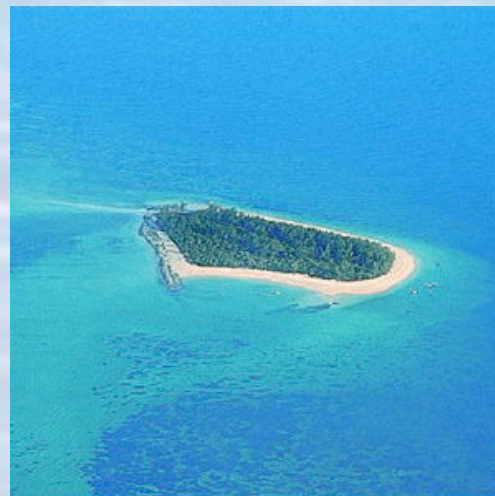
Case Study: Tanzania



Kilwa ruins



Saadani Game Reserve



Mafia Island

Case Study: Tanzania

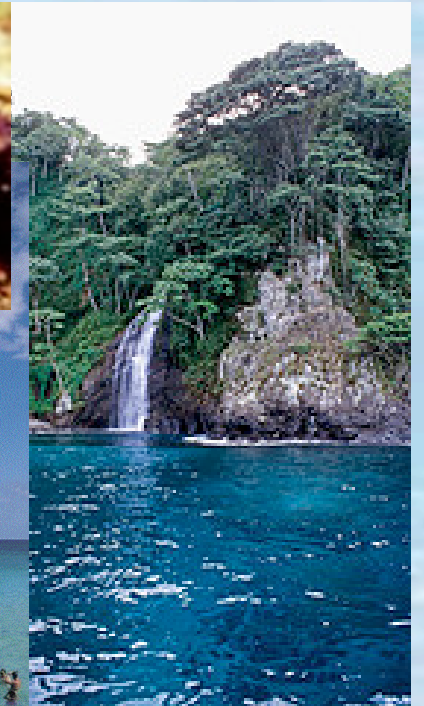
Results: identified three areas with unique attractions:

1. Marine reserve with excellent diving on beautiful tropical island
2. Unique ruins near beautiful beaches
3. Unique wildlife-viewing location (big game at seashore)

Made concrete, specific recommendations for hotel construction & permitting, necessary road/ferry improvements, etc.

LESSON: Value of full inventory of entire coast with attention to "clustering" - attractions located near each other

4.4 ATTRACTIONS INVENTORY



Exercise: Attractions inventory

Each MPA team set up at a different table.

Take out any maps of your MPA (including yesterday's mapping project) and spread them out on the table. Choose one map as your main working map (for this exercise & several later exercises).

You will mark the locations of attractions (and later, infrastructure) on overlays that you can place on top of the map.

3 steps: List, Map, Rank

Attractions inventory

Step 1: List your MPA's attractions

Natural attractions: physical features (beaches, mangrove forests, etc.) and **biotic features** (unique and endangered species, birds, marine mammals, sharks, reef communities, etc.)

Cultural attractions: public markets, rituals, festivals, music & dance, traditional cuisine, local livelihoods such as fishing, farming

Historic and Heritage attractions: forts, museums, churches, archeological sites, etc.

Recreational activities: boating, hiking, snorkelling and diving, fishing, camping, wildlife viewing, etc.

Attractions inventory

Step 2: Mapping attractions

Mark the location of all attractions on an acetate overlay(s) so that you can move it on and off the map. (Try sketching this by hand in pencil first; use highlighters for color-coding.)

Primary attraction - will draw tourists all by itself

Secondary attraction - will draw tourists if it is near a primary attraction

Which attractions are near each other?

Which are accessible and near lodging?

Attractions inventory

Step 3: Rank and evaluate attractions

Use the worksheets to rank attractions based on:

- **Uniqueness**
- **Aesthetic or scenic value**
- **Biodiversity**
- **Cultural value**
- **Historical value**
- **Uses & activities (for tourists)**
- **Community participation**
- **Ability to control tourism at the site**
- **Access**
- **Product development (cleaning, signs, etc.)**

4.5 INFRASTRUCTURE & CAPACITY

Does the MPA have sufficient infrastructure to handle tourists?

What development would need to occur before sustainable tourism could begin (or be expanded)?

- Would tourists have high-quality food, lodging & transportation?**
- Do tourist attractions need refurbishment, explanatory materials, etc.?**
- Do guides and boats exist for specialized activities? (scuba diving, bird watching, fishing, etc.)**

Exercise: Infrastructure & Capacity Inventory

One-hour discussion on your MPA's:

- 1. Transportation & accessibility**
distance to major cities & airports
busses, ferries, road quality
- 2. Public services**
police, electricity, sewer, water, etc.
- 3. Environmental quality**
air quality, water pollution, litter, etc.

Mark these on a new acetate overlay(s) for your map.

Other inventories

Later, you may wish to perform other inventories such as:

Supply & competitiveness - what other tourist sites exist nearby? What are the other choices that tourists have, and how does your MPA compare?

Labor inventory - What is the size of the local population, their education level, and their skills? What labor force will tourism need, and can the local community supply it?

See the handouts for details.

5.6 - ASSESSING TOURISM'S “FOOTPRINT”

How will tourism affect the environment?

Potential benefits:

Financing
Jobs & income
Constituency building
Private conservation



Potential costs:

Flora & fauna affected
Critical habitat damaged
Ecological processes affected
Biological corridors disrupted
Water use & pollution
Energy use & associated pollution
Wastewater, sewage, trash & litter
Development/construction
Invasive species introduced

Sources of information for “footprint analysis”

1. Research existing literature on tourism’s potential impacts in areas like your MPA.
 - Interview local & national experts. When possible, bring them to your MPA to see the site.

See the handout for some ideas for sources of information, and useful questions to ask experts.

Exercise: Footprint Analysis

Fill out a “Footprint Matrix” for your MPA.

For any environmental impact, consider:

- controllability

- likelihood of occurrence

- likelihood duration & magnitude

- breadth, depth & diffusion

Summarize the overall impact of any given tourist activity with a +, -, or 0.

Review the completed matrix to help decide whether tourism development overall would be a *benefit* or a *cost*.

The Big Picture - the ETPS

1. Each MPA report on its main findings for attractions, infrastructure, & footprint.
2. Set up a map of the entire ETPS. Mark all MPAs on it and note briefly each one's unique features.
3. Mark locations of other major attractions in the ETPS, and of major air, roads, and ferry service.

What patterns emerge?

Where in the ETPS do attractions occur close together, so that they could be marketed to tourists as part of a single tour package?

How do these ideas connect with the tourism vision for the ETPS that you developed yesterday?

ETPS

TRAINING

Review & Next Steps

